

PURCHASING RECORDS RETENTION SCHEDULE

These records are extracted from the State of Idaho *Records Management Guide*, updated November, 2004.

TABLE OF CONTENTS

PURCHASING RECORDS	A-9-80
Bidders List Or Card Files	A-9-80
Cancelled Solicitation Files	A-9-80
Contract Appeals Case Files	A-9-80
Contract Purchasing Files	A-9-80
Leasing Contract Files	A-9-80
Professional Contractual Agreement Files	A-9-81
Purchase Requisition Files	A-9-81
Successful Bids And Proposals Files	A-9-81
Supply Management Files	A-9-81
Tax Exemption Files	A-9-81
Unopened Bids And Proposals	A-9-81
Unsuccessful Bids And Proposals Files	A-9-82

PURCHASING RECORDS

SG1101. BIDDERS LIST OR CARD FILES

Lists of acceptable bidders who are eligible for contracting with the State to provide products or services.

Retention *Record copy:* Retain for 1 year and then destroy.

SG1102. CANCELLED SOLICITATION FILES

Formal solicitations of offers to provide products or services (e.g., Invitations for Bids, Requests for Proposals, Requests for Quotations) which were canceled prior to the awarding of a contract. Information includes pre-solicitation documentation on the requirement, offers opened prior to cancellation, documentation on government action up to the time of cancellation, and evidence of cancellation.

Retention *Record copy:* Retain for 3 years after contract termination and then destroy.

SG1103. CONTRACT APPEALS CASE FILES

Case files consisting of notices of appeal and acknowledgments, correspondence between parties, contracts copies, plans, specifications, exhibits, change orders and amendments, transcripts of hearings, documents received from parties concerned, final decisions, and other related records.

Retention *Record copy:* Retain for 3 years after contract termination and then destroy.

SG1104. CONTRACT PURCHASING FILES

Files which document transactions of \$10,000 or less and construction contracts under \$2,000. They include contract, requisition, purchase order and lease records, correspondence, related records pertaining to award, administration, receipt, inspection, and payments.

Files which document transactions of more than \$10,000 and construction contracts exceeding \$2,000. The files include contract, requisition, purchase order and lease records, correspondence and related records pertaining to award, administration, receipt, inspection, and payments.

Retention *Record copy:* Retain for 3 years after final payment or after contract termination and then destroy.

SG1107. LEASING CONTRACT FILES

Building or equipment leases and related records documenting agreements, services, and payments.

Retention *Record copy:* Retain for 3 years after contract termination and then destroy.

- SG1108. PROFESSIONAL CONTRACTUAL AGREEMENT FILES**
Files documenting the professional contractual agreements between an agency and a professional individual, or between agencies for temporary services. The files include contract, requisition, purchase order, correspondence, and related records.
Retention *Record copy:* Retain for 3 years after last payment or after contract termination and then destroy.
- SG1110. PURCHASE REQUISITION FILES**
Requisitions for supplies and equipment for current inventory.
Retention *Record copy:* Retain for 3 years after contract termination and then destroy.
- SG1112. SUCCESSFUL BIDS AND PROPOSALS FILES**
Solicited and unsolicited successful bids and proposals to provide products or services to an agency by a private contractor.
Retention *Record copy:* Retain for 3 years after contract termination and then destroy.
- SG1113. SUPPLY MANAGEMENT FILES**
Files of reports on supply requirements and procurement matters submitted for supply management purposes (other than those incorporated in case files or other files of a general nature).
Retention *Record copy:* Retain for 3 years after contract termination and then destroy.
- SG1114. TAX EXEMPTION FILES**
Tax exemption certificates and related records.
Retention *Record copy:* Retain for 3 years after period covered by related account and then destroy.
- SG1115. UNOPENED BIDS AND PROPOSALS**
Solicited and unsolicited bids and proposals to provide products or services which, due to funding or administrative reevaluation, are no longer required by the agency or will not be open to the bidding process.
Retention *Record copy:* Retain for 1 year and then destroy.

SG1116. UNSUCCESSFUL BIDS AND PROPOSALS FILES

Solicited and unsolicited unsuccessful bids and proposals to provide products or services to an agency by a private contractor.

Retention *Record copy:* Retain for 2 years and then destroy.

INDEX

B

- Bidders List Or Card Files ----- A-9-80
Bids And Proposals
 Successful Files ----- A-9-81
 Unopened ----- A-9-81
 Unsuccessful Files ----- A-9-82

C

- Cancelled Solicitation Files ----- A-9-80
Contract
 Appeals Case Files ----- A-9-80
 Purchasing Files ----- A-9-80

F

- Files
 Bidders List of Card Files ----- A-9-80
 Bids and Proposals, Successful ----- A-9-81
 Bids And Proposals, Unsuccessful ----- A-9-82
 Cancelled Solicitation ----- A-9-80
 Contract Appeals Case ----- A-9-80
 Contract Purchasing ----- A-9-80
 Leasing Contract ----- A-9-80
 Professional Contractual Agreement ----- A-9-81
 Purchase Requisition ----- A-9-81

- Supply Management ----- A-9-81
Tax Exemption ----- A-9-81

L

- Leasing Contract Files ----- A-9-80

P

- Professional Contractual Agreement
 Files ----- A-9-81
Purchase Requisition Files ----- A-9-81
Purchasing Records ----- A-9-80

R

- Records
 Purchasing ----- A-9-80

S

- Supply Management Files ----- A-9-81

T

- Tax
 Exemption Files ----- A-9-81